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ABSTRACT

This report analyzes $320 million in alcohol product advertising in magazines during calendar year 2001. The first section analyzes the amount of magazine advertising delivered to youth and adults by different alcoholic beverage brands. For many beer and distilled spirits brands, the youth population received more advertising than the adult population. The second section looks at the size and concentration of the youth audiences in the magazines in which the alcohol industry marketers placed ads in 2001. This same information, with all of its levels of detail, is available to industry marketers in making advertising decisions. The report's findings reveal that youth saw far more alcoholic beverage ads in magazines in 2001 than did people of legal drinking age. In effect, young people under the legal drinking age of 21 were a major target audience for the industry's magazine advertising in 2001, despite the industry's claims to the contrary. Three appendixes contain the study methodology, a glossary of advertising terms, and list of magazines not measured. (GCP)

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ED 477 962

Overexposed: Youth a Target of Alcohol Advertising in Magazines

Report of the Center on Alcohol Marketing and Youth

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OVEREXPOSED:

Youth a Target of Alcohol Advertising in Magazines

Executive Summary

Youth See More Alcohol Advertising than Adults

America's youth[1] saw far more alcoholic beverage ads in magazines in 2001 than did people of legal drinking age. This pattern of the alcohol industry exposing youth to more advertising than adults cut across beverage types and brands, with the notable exception of wine. In effect, young people under the legal drinking age of 21 were a major target audience for the industry's magazine advertising in 2001, despite the industry's claims to the contrary.[2] The following analysis shows where and how the alcohol industry exposed youth to its products.

Our key findings are:

- **More beer and distilled spirits ads:** Marketers of beer and distilled spirits brands delivered more advertising to youth than to adults in magazines in 2001 - 45% more for beer brands and 27% more for distilled spirits brands.[3]
- **More "malternative" ads:** Marketers of low-alcohol refreshers, the so-called "malternatives" such as Smirnoff Ice, delivered 60% more advertising to youth than to adults.
- **Fewer wine ads:** For wine, the second leading alcohol advertising category in magazines, youth saw 58% less advertising than adults. The ability of most wine advertisers to reach an adult audience while minimizing reach to the underage audience shows how advertisers can reach an adult target audience without overexposing youth.
- **Only young adults see more ads than underage youth:** Underage youth saw nearly as much advertising as young adults ages 21-34. Adults ages 35+ were a distant third audience. For example, those ages 21-34 saw 16% more beer advertising than youth 12-20, while underage youth saw 95% more beer advertising than adults 35+.
- **Alcohol ad dollars follow youth audiences:** Ten magazines with underage audience compositions at or above 25% accounted for nearly one-third of all alcohol advertising expenditures in measured magazines. (In 1999 the Federal Trade Commission pointed to a 25% underage audience as an effort by some companies to limit underage youth exposure.) In addition, more than half of the money spent on alcohol magazine advertising was in 24 magazines with youth audiences that exceeded 15.8%, the percentage of youth 12-20 in the U.S. population age 12 and over.[4] In fact, twenty-five brands placed all of their magazine advertising in youth-oriented magazines.

[1] For this report, unless otherwise noted, "youth" are defined as persons ages 12-20, and "adults" are defined as persons ages 21 and over.
[2] Center on Alcohol Marketing and Youth. "The alcohol industry on record." September 2002. <www.camy.org>.
[3] Percentages represent product advertising per capita.
[4] Based on audience estimates for the MRI 2001 Teenmark Study and the MRI 2002 Spring Adult Study.

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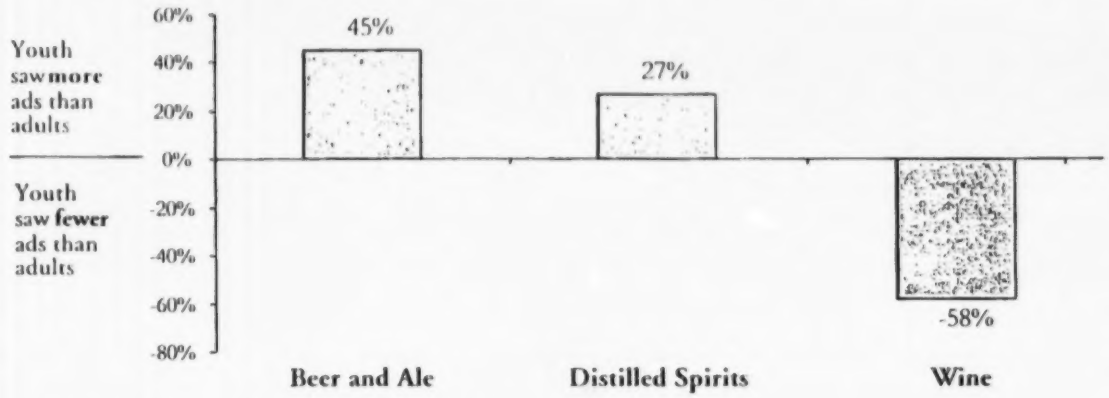
The Center on Alcohol Marketing and Youth

September 24, 2002

Center on Alcohol Marketing and Youth
Georgetown University
2233 Wisconsin Avenue, N.W., Suite 525
Washington, D.C. 20007
(202) 687-1019
www.camy.org

Figure 1 - Relative Magazine Advertising Exposure



Sources: CMR 2001, MRI Teenmark 2001, MRI Adult Study Spring 2002

Why the Concern about Advertising

The consequences of underage drinking are real and tragic. Alcohol use plays a substantial role in all three leading causes of death among youth - unintentional injuries (including motor vehicle fatalities and drownings), suicides and homicides.[5] Children who begin drinking before the age of 15 are four times more likely to develop alcohol dependence than those who wait until the age of 21.[6] In the most recent federal survey of school children, 16.6% of eighth graders reported having been drunk at least once in the past year, and by the tenth grade, that number is 39.9%.[7]

Restricting access to alcohol and reducing its appeal to underage youth are the foundations of the public health strategy to reduce underage drinking. To implement the reduction in appeal, policymakers and advocates have proposed various standards to limit youth's exposure to alcohol advertising and promotion. In September 1999, the Federal Trade Commission issued a report reviewing the alcohol industry's advertising and marketing practices. The FTC report called on the industry to "raise the current standards to reduce underage alcohol ad exposure,"[8] noting that some companies restrict advertising to venues where the underage audience is 25% or less.[9] Mothers Against Drunk Driving has called for restricting broadcast alcohol advertising to shows with a youth viewership of 10% or less,[10] and the American Medical Association has called for a total ban on broadcast alcohol advertising.[11]

But as this report shows, youth exposure to alcohol advertising in magazines is widespread but probably not appreciated. In fact, policymakers and other parents are likely to be surprised by the amount of magazine advertising to their children and other youth. As the numbers show, youth ages 12-20 are much more exposed to alcohol advertising than adults over the age of 35.

An appreciation of how much tobacco advertising was reaching youth precipitated policy changes there. And even after the 1998 Master Settlement Agreement between the tobacco industry and the nation's state attorneys-gen-

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[5] American Medical Association. "Research and Facts about Youth and Alcohol." <http://www.ama-assn.org/ama/pub/category/3566.html>.

[6] Grant, B.F., D.A. Dawson. (1997). "Age at onset of alcohol use and its association with DSM-IV alcohol abuse and dependence: Results from the National Longitudinal Alcohol Epidemiologic Survey." *Journal of Substance Abuse* 9: 103-110.

[7] Johnston, L.D., P.M. O'Malley, et al. (2002). *Monitoring the Future National Survey Results on Drug Use*, 1975-2001. Bethesda, MD, National Institute on Drug Abuse.

[8] Federal Trade Commission. FTC *Reports on Industry Efforts to Avoid Promoting Alcohol to Underage Consumers: Self-Regulation Can Be Effective, But Third-Party Review Needed.* 9 September 1999. <http://www.ftc.gov/opa/1999/9909/alcoholrep.htm>.

[9] Federal Trade Commission. (September 1999). *Self-Regulation in the Alcohol Industry: A Review of Industry Efforts to Avoid Promoting Alcohol to Underage Consumers.* Executive Summary: ii.

[10] Mothers Against Drunk Driving. MADD Online: MADD's Positions on Responsible Marketing and Service. <http://www.madd.org/activism/0,1056,1621,00.html>.

[11] American Medical Association. "Alcohol Availability, Promotion, Taxation & Labeling." <http://www.ama-assn.org/ama/pub/article/3342-3626.html>.

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eral, cigarette companies continued to use magazine advertising and exposed youth to their advertising.[12] In the wake of criticism from the public health community about that tactic, Philip Morris, for instance, ceased advertising in publications where the composition of those younger than 18 was 15% or more of the total readership, or where the audience included more than 2 million persons younger than 18 years or age, based on readership data.[13]

Because this report's data provides a clear picture of how overexposed youth are to alcohol advertising in magazines, the FTC should re-open its inquiry into the industry's practices.

"Reverse Engineering" Alcohol Advertising

This report employs the same tools, syndicated data sources, and procedures utilized by media planners and buyers to execute advertising campaigns. By "reverse engineering" the actual alcohol advertising in magazines in 2001, this analysis sheds light on the information that is available to alcohol industry marketers when they make decisions about where and how to spend advertising dollars. Audience data for all of the advertising analyzed in this report is tracked by Mediamark Research Inc. (MRI), the leading source of U.S. magazine audience estimates for consumer advertising.

Magazine Advertising in Context

Magazines are a uniquely flexible advertising medium. They offer advertisers substantial exposure to consumers, while still providing precise targeting by demographic and lifestyle factors based on specialized content.

Magazine advertising represented 25.6% of total reported advertising for alcoholic beverages in 2001.[14] This varied by beverage group, as distilled spirits brands use magazines as a primary medium (82.7% of their reported spending in 2001), while beer and ale brands predominantly use television. Distilled spirits brands represent the majority of advertising exposures documented in this report.

About This Report

This report analyzes $320 million in alcohol product advertising in magazines during calendar year 2001. This is all of the magazine expenditures in national magazines measured by MRI, the industry standard for magazine audience measurement, totaling 80% of all alcohol product advertising expenditures in magazines in 2001.

The first section analyzes the amount of magazine advertising delivered to youth and adults by different alcoholic beverage brands. For many beer and distilled spirits brands, the youth population received more advertising than the adult population.

The second section looks at the size and concentration of the youth audiences in the magazines in which the alcohol industry marketers placed ads in 2001. This same information, with all of its levels of detail, is available to alcohol industry marketers in making advertising decisions.

Center on Alcohol Marketing and Youth

www.camy.org

The Center on Alcohol Marketing and Youth at Georgetown University monitors the marketing practices of the alcohol industry to focus attention and action on industry practices that jeopardize the health and safety of America's youth. Reducing high rates of underage alcohol consumption and the suffering caused by alcohol-related injuries and deaths among young people requires using the public health strategies of limiting the access to and the appeal of alcohol to underage persons.

The Center is supported by grants from The Pew Charitable Trusts and The Robert Wood Johnson Foundation to Georgetown University.

Virtual Media Resources

The Center commissioned Virtual Media Resources to conduct this analysis. Virtual Media Resources is a media research, planning, market analysis and consulting firm based in Natick, Massachusetts, serving communications organizations and marketers in a wide variety of market segments and media. VMR was established in 1992 to provide an independent research firm serving advertising agencies, and has grown to service over 100 clients across the US and Canada, including retail, publishing, financial, automotive, public health and other fields.

VMR adhered to industry-standard methodologies in conducting this

[12] Turner-Bowker, D., W.L. Hamilton. (2000). "Cigarette Advertising Expenditures Before and After the Master Settlement Agreement: Preliminary Findings." Massachusetts Department of Public Health.

[13] Philip Morris U.S.A. Our Responsibility-Responsible Marketing. <http://www.philipmorrisusa.com/DisplayPageWithTopics917.asp>.

analysis, using standard industry sources, including Competitive Media Reporting, Inc. (CMR), a service that provides advertising expenditure and occurrence information to advertising agencies, their clients and the media; and Mediamark Research Inc. (MRI) and Simmons Market Research Bureau, Inc. (SMRB), services that provide audience estimates for magazines and other media.

More information about the methodology used to create this report is included in Appendix A.

Acknowledgements

The Center on Alcohol Marketing and Youth would like to thank the following researchers for their independent review of this report. The opinions expressed in this report are those of the authors and do not necessarily reflect those of the foundations or reviewers.

Robert A. Frydlewicz
Former Vice President, Media Research Director, Foote, Cone & Belding, New York and N.W. Ayer and Partners, New York

Stu Gray
Former Senior Vice President, Director of Media Resources, BBDO New York; Member of the Board of Directors of the Advertising Research Foundation

Michael Siegel, MD, MPH
Associate Professor, Boston University School of Public Health

Introduction - Targeting Youth

What does it mean to "target youth" or any audience? Advertisers seek to reach their target audiences by selecting media:

1) where their intended audiences are highly concentrated;
2) that provide broad reach of these audiences;
3) that provide a supportive environment for advertising messages;
4) that are priced to deliver these audiences efficiently.

In today's media-rich environment, advertisers can use demographic research to fine-tune their advertising plans. This research allows advertisers to reach audiences that may be segmented by their interests, age, gender, income and numerous other factors. This is especially true in the publishing industry, where magazine content exists for a multitude of demographic and interest-based segments, and where audience data are available from a number of accepted industry-standard data providers.

How well a target audience is hit may thus be measured with precision. Advertising exposure is most commonly measured in terms of reach, frequency, impressions, rating points and audience composition. Complete definitions are in the Glossary, but for reading this analysis the following summary definitions are provided:

- **Reach** is used to describe the percentage of a given age group that has the opportunity to see an ad or a campaign ("75% reach of ages 12-20") through exposure to specific media.
- **Frequency** indicates the number of times individuals have an opportunity to see an ad or campaign through exposure to specific media; it is most often expressed as an average number of exposures. For example, an average frequency of 6.8 shows that, of those reached, the average individual saw an ad 6.8 times.
- An advertising **impression** is an exposure of a person to a publication in which an ad appears; impressions are typically cited in relation to a specific target audience and usually include multiple exposures.
- **Rating points, or GRPs (Gross Rating Points)**, are a measurement of total advertising impressions and reflect both reach and frequency. Rating points are the most general measure of advertising exposure and are the measurement used most often in this report.

[4] Expenditure data are from Competitive Media Reporting (CMR).

Section 1 - Youth See More Beer and Distilled Spirits Advertising

Total youth exposure to beer and distilled spirits advertising in print in 2001 was systematic and pervasive. On average, youth saw much more print alcohol advertising for a wide range of products than did the legal-age population of adults.

- For beer and ale, youth saw 45% more ads than adults (Table 1).
- For distilled spirits, youth saw 27% more ads than adults. This is particularly significant because distilled spirits ads accounted for 82% of all youth print alcohol advertising impressions.
- "Low-alcohol refreshers"[15] was one of the fastest-growing alcohol advertising categories: in the first six months of 2002, measured ad spending across all media on these "malternatives" or "alcopops" was $85.2 million, compared to $35.4 million in the first six months of 2001.[16] In this category, the youth/adult reach disparity was greatest: 62% of the youth population was reached in 2001, compared to only 44% of the adult population.
- Only among wine advertisers was the ratio clearly tilted towards legal-age audiences. On average, youth received 58% fewer wine magazine advertising messages than adults.

Table 1: Ad Exposure by Beverage Type

Alcoholic Beverage Type	Youth Ages 12-20			Adults Age 21 and Over			Ad Exposure Ratio 12-20 / 21+
	Ad Exposure (Rating Points)	% Reached	Avg # Ads	Ad Exposure (Rating Points)	% Reached	Avg # Ads	
Beer and Ale - All	*1,779*	*84%*	*21*	*1,227*	*76%*	*16*	*1.45*
Beer and Ale - Regular Beer & Ale	1,190	78%	15	829	70%	12	1.44
Beer and Ale - Light Beer	579	68%	9	395	58%	7	1.46
Beer and Ale - Malt Liquor	10	10%	1	3	3%	1	3.74
Distilled Spirits - All	*12,550*	*92%*	*136*	*9,916*	*95%*	*104*	*1.27*
Distilled Spirits - White Goods	5,803	88%	66	4,555	90%	51	1.27
Distilled Spirits - Whiskey	3,429	83%	41	3,048	84%	36	1.12
Distilled Spirits - Distilled Specialties	2,246	79%	29	1,600	79%	20	1.40
Distilled Spirits - Brandy and Cognac	1,072	71%	15	712	56%	13	1.51
Wine - All	*568*	*55%*	*10*	*1,359*	*72%*	*19*	*0.42*
Wine - Table Wine	467	54%	9	1,173	70%	17	0.40
Wine - Sparkling Wine	97	27%	4	166	33%	5	0.58
Wine - Vermouth	1	1%	1	3	3%	1	0.21
Wine - Port	2	1%	2	11	5%	2	0.18
Wine - Sherry	1	1%	1	6	4%	1	0.18
Low-Alcohol Refresher	*399*	*62%*	*6.45*	*250*	*44%*	*6*	*1.60*
All Alcoholic Beverages	*15,296*	*93%*	*165*	*12,752*	*96%*	*133*	*1.20*

Sources: CMR 2001, MRI Teenmark 2001, MRI Adult Study Spring 2002

[15] Though they are called "low-alcohol refreshers" by the alcoholic beverage industry, many of the beverages in this category contain 5% alcohol, more than most beers.

[16] CMR 2001, 2002

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In addition to the demographic split of 12-20 and 21+, which divides the legal drinking age population from the underage population, an analysis was conducted of the audience exposure using other demographic splits, youth 12-20 vs. adults ages 21-34 vs. adults ages 35 and older.

Underage youth saw nearly as much advertising as young adults ages 21-34. Adults ages 35+ were a distant third audience.

Table 2 – Ad Exposure by Beverage Type for Ages 12-20, 21-34, and 35+

	Youth Ages 12-20			Adults Age 21 to 34			Adults Age 35 and Over		
Alcoholic Beverage Type	Ad Exposure (Rating Points)	% Reached	Avg # Ads	Ad Exposure (Rating Points)	% Reached	Avg # Ads	Ad Exposure (Rating Points)	% Reached	Avg # Ads
Beer and Ale - All	***1,779***	***84%***	***21***	***2,064***	***88%***	***23***	***914***	***71%***	***13***
Beer and Ale - Regular Beer & Ale	1,190	78%	15	1,445	82%	18	599	62%	10
Beer and Ale - Light Beer	579	68%	9	613	71%	9	314	53%	6
Beer and Ale - Malt Liquor	10	10%	1	6	6%	1	1	1%	1
Distilled Spirits - All	***12,550***	***92%***	***136***	***15,892***	***98%***	***162***	***7,680***	***94%***	***82***
Distilled Spirits - White Goods	5,803	88%	66	7,316	95%	77	3,522	87%	41
Distilled Spirits - Whiskey	3,429	83%	41	4,544	92%	49	2,488	81%	31
Distilled Spirits - Distilled Specialties	2,246	79%	29	2,778	87%	32	1,159	73%	16
Distilled Spirits - Brandy and Cognac	1,072	71%	15	1,253	72%	17	510	49%	10
Wine - All	***568***	***55%***	***10***	***1,285***	***76%***	***17***	***1,386***	***70%***	***20***
Wine - Table Wine	467	54%	9	1,086	73%	15	1,206	69%	17
Wine - Sparkling Wine	97	27%	4	182	39%	5	160	31%	5
Wine - Vermouth	1	1%	1	2	2%	1	4	4%	1
Wine - Port	2	1%	2	10	5%	2	12	5%	2
Wine - Sherry	1	1%	1	6	4%	1	6	4%	1
Low-Alcohol Refresher	***399***	***62%***	***6***	***480***	***66%***	***7***	***164***	***36%***	***5***
All Alcoholic Beverages	***15,296***	***93%***	***165***	***19,720***	***98%***	***201***	***10,144***	***95%***	***107***

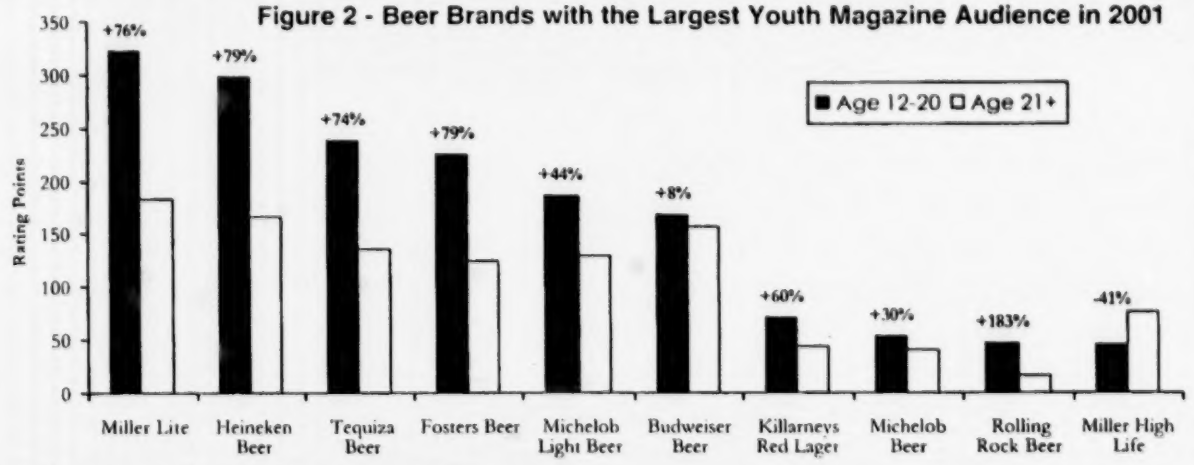
Sources: CMR 2001, MRI Teenmark 2001, MRI Adult Study Spring 2002

Brands Expose Youth to More Advertising

A number of beer and distilled spirits brands exposed significantly more youth than legal-age adults to their advertising. An analysis of brands with the most advertising directed at the youth audience in 2001 demonstrates this.

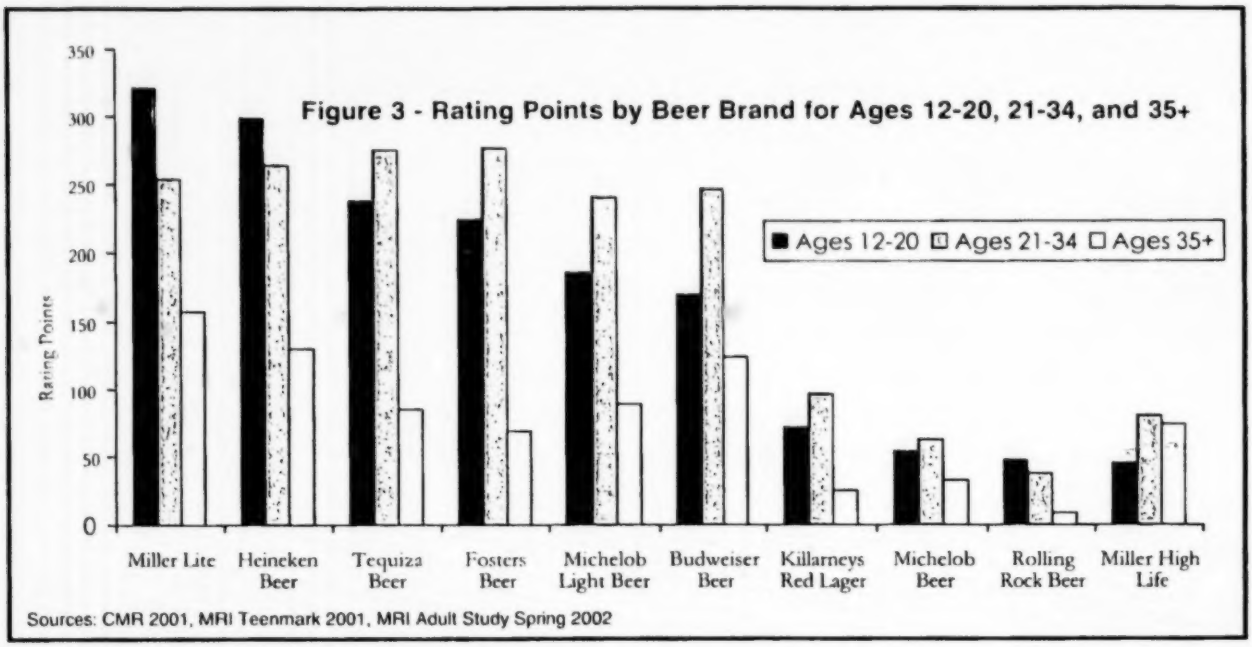
Nine of the ten beer and ale brands with the largest youth magazine audience in 2001 (Figure 2), exposed youth to more alcohol ads than adults. In fact, the top four brands had youth ad exposure that was more than 70% higher than adult ad exposure. Miller Lite had the most beer advertising delivered to youth, with 76% more exposure to youth than to adults. Only Miller High Life in this analysis delivered more magazine advertising to adults than to youth.

Figure 2 - Beer Brands with the Largest Youth Magazine Audience in 2001

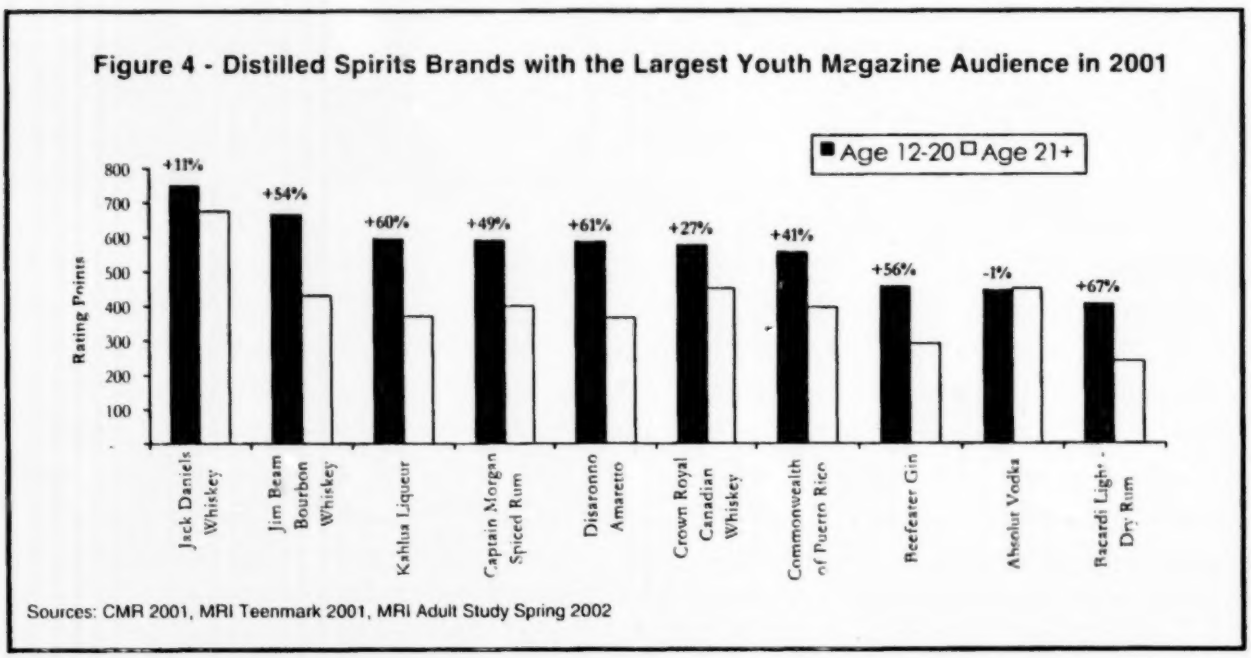


Sources: CMR 2001, MRI Teenmark 2001, MRI Adult Study Spring 2002

Those ages 21-34 saw 16% more beer advertising than youth ages 12-20, but youth ages 12-20 saw 95% more beer advertising than adults over 35.



A similar set of analyses was conducted for distilled spirits brands with the most advertising directed at the youth audience in 2001. Nine of the ten distilled spirits brands with the largest youth magazine audience more effectively reached youth than adults in 2001. Kahlua and Amaretto, representative of several liqueur and cordial brands, delivered to youth at least 60% more advertising than to adults. Rum is another large category that delivered advertising to youth with brands including Bacardi, Captain Morgan, and the Commonwealth of Puerto Rico (promoting Puerto Rican rum). Absolut vodka delivered virtually the same amount of advertising to youth as to the adult population in 2001.



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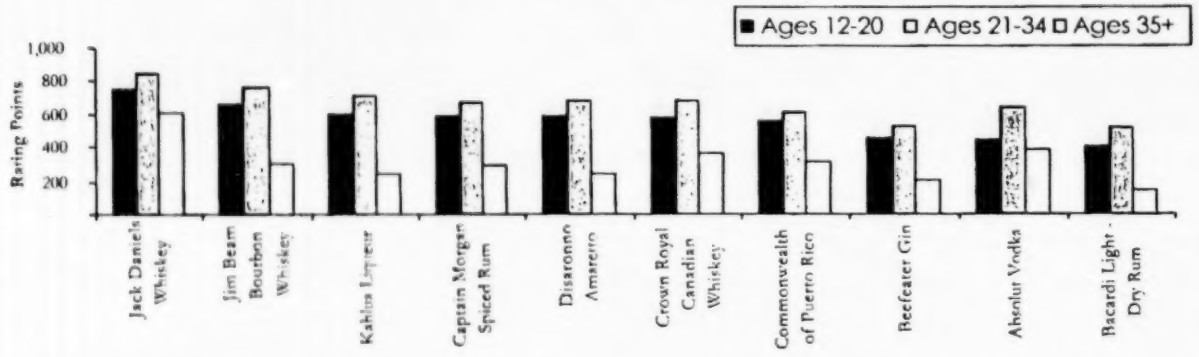
Those ages 21-34 saw 26% more distilled spirits ads than youth 12-20, but youth saw 63% more distilled spirit ads than adults over 35.

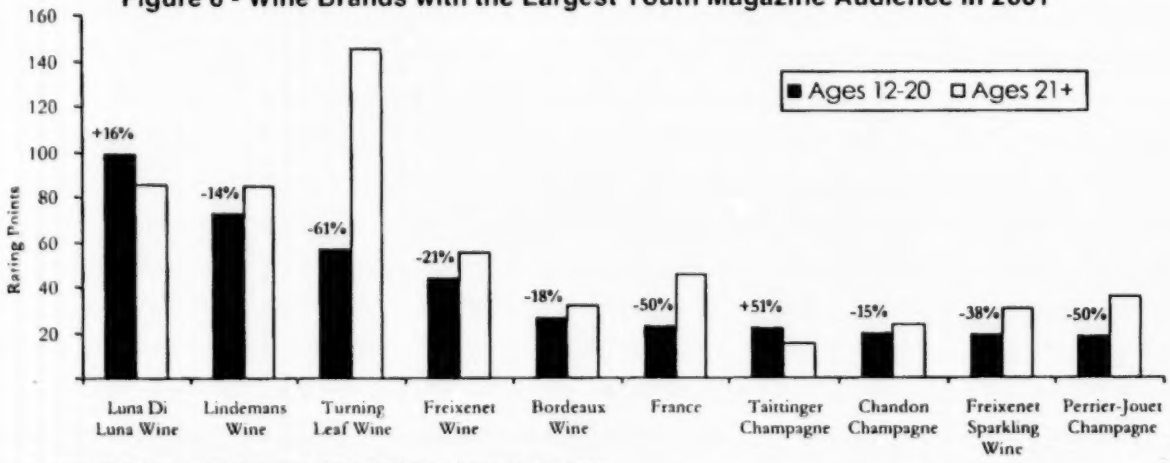
Figure 5 - Rating Points by Distilled Spirits Brand for Ages 12-20, 21-34, and 35+



Sources: CMR 2001, MRI Teenmark 2001, MRI Adult Study Spring 2002

In contrast, only two of ten wine brands with the largest youth magazine audience in 2001- Luna Di Luna Wine and Taittinger Champagne - more effectively reached youth than adults.

Figure 6 - Wine Brands with the Largest Youth Magazine Audience in 2001



Sources: CMR 2001, MRI Teenmark 2001, MRI Adult Study Spring 2002

Turning Leaf wine showed the most adult-oriented pattern of advertising of the brands examined, as youth were exposed to 61% less advertising than adults.

Those ages 21-34 saw 126% more wine ads than youth, and adults over 35 saw 144% more wine ads than those ages 12-20.

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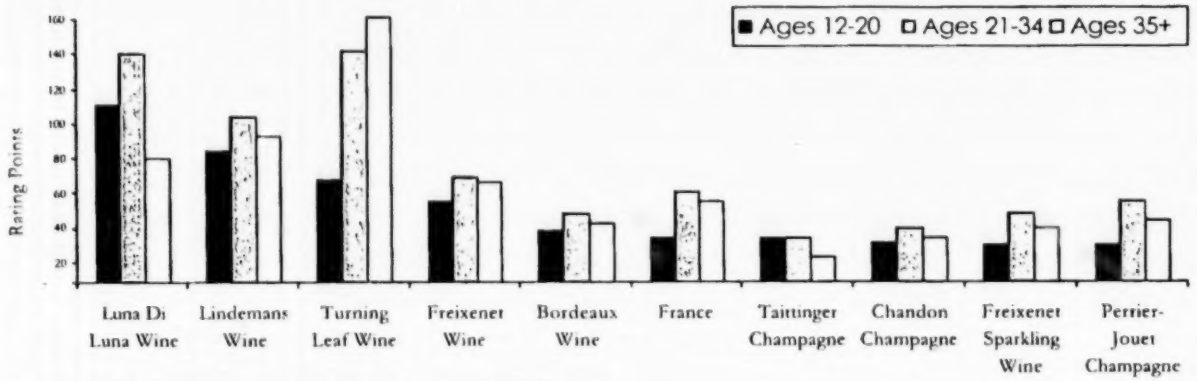
Figure 7 - Rating Points by Wine Brand for Ages 12-20, 21-34 and 35+



Sources: CMR 2001, MRI Teenmark 2001, MRI Adult Study Spring 2002

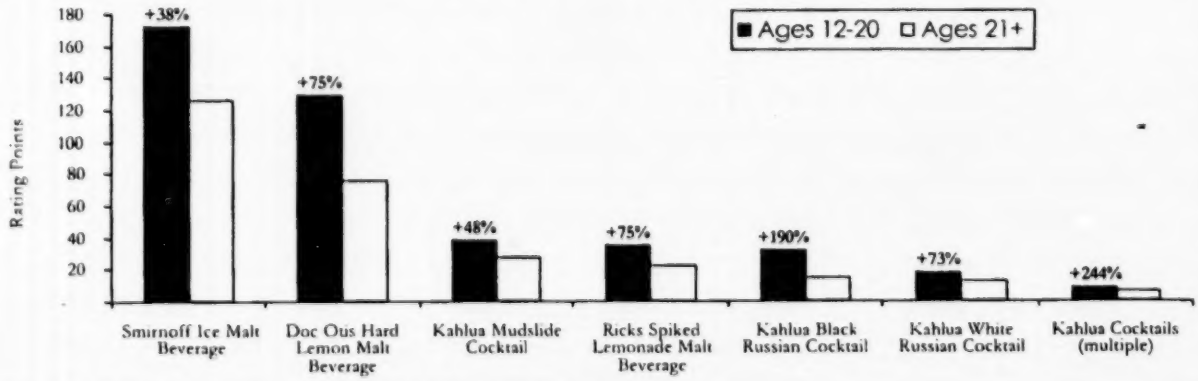
The ability of most wine advertisers to reach an adult audience while minimizing reach to the underage audience is an example of how magazine audience screening can reach a target audience without overexposing youth.

As mentioned previously, the "low-alcohol refresher" brands are significantly increasing their magazine advertising presence. In the first six months of 2002, total advertising dollars for these products increased 241% over the first six months of 2001.

In addition, a May 2001 poll by the Center for Science in the Public Interest found that, by a three to one margin, teens report more familiarity than adults with "alcopops," and 17- and 18-year-olds are twice as likely to have tried them.[17] Though they are called "low-alcohol refreshers" by the industry, many of the beverages in this category contain 5% alcohol, more than most beers.

The analysis of "malternatives" shows that all seven brands with magazine advertising in 2001 delivered more ads to youth audiences than to adult audiences.

Figure 8 - Low Alcohol Refresher Brands with the Largest Youth Magazine Audience in 2001



Sources: CMR 2001, MRI Teenmark 2001, MRI Adult Study Spring 2002

[17] Center for Science in the Public Interest. "Summary of Findings: What Teens and Adults are Saying about Alcopops." Booze News. May 2001. <http://www.cspinet.org/booze/alcopops_summary.htm>.

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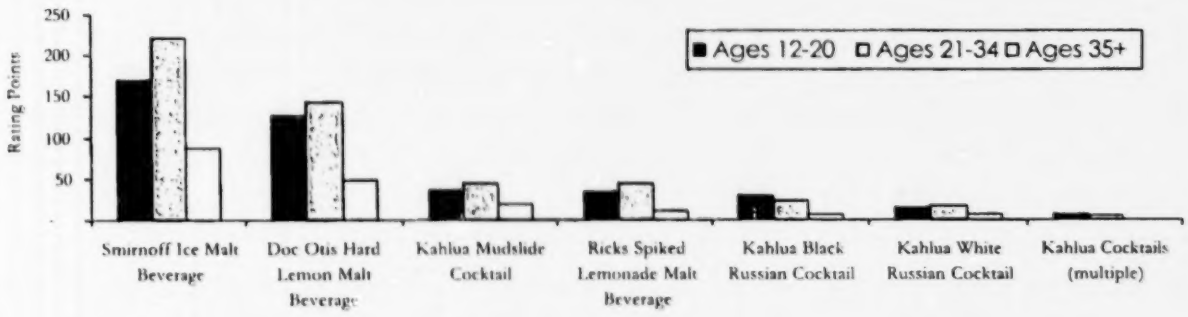
Those ages 21-34 saw 20% more low alcohol refresher ads than youth ages 12-20, but youth saw 144% more low alcoh refresher ads than adults over 35.

Figure 9 - Rating Points by Low-Alcohol Refresher Brand for Ages 12-20, 21-34, and 35+



Sources: CMR 2001, MRI Teenmark 2001, MRI Adult Study Spring 2002

Section 2 - Magazines with Young Audiences and High Alcohol Ad Content

More than half of the money spent on alcohol magazine advertising in 2001 was in 24 magazines with youth audiences that exceeded the proportion of youth in the population age 12 and over. Ten magazines with a youth audience of more than 25%–*Vibe, Spin, Rolling Stone, Allure, Car and Driver, Maxim, Glamour, Motor Trend, In Style,* and *Sports Illustrated*–accounted for nearly one-third of alcoholic beverage advertising in 2001 in measured magazines.

Advertisers typically seek magazines with high concentrations of their target audience. By that standard, a magazine's audience concentration strongly suggests the audience that its advertisers intend to reach. A number of the magazines in which alcohol products were advertised in 2001 had especially high concentrations of youth readers ages 12-20.

Specifically, media planners look at the "audience composition" and "population index" of a magazine to determine how effectively it will reach a particular audience, such as youth 12-20. Audience composition is the percentage of the total readership of a magazine that matches a particular demographic group. Population index is the ratio of the audience composition to the demographic group's percentage in the general population.

A population index greater than 1 indicates that the audience is high concentrated with a particular dem graphic group, while an index belo 100 indicates that a group is under-re resented in a magazine's readershi *Vibe* is an example. The readership *Vibe* has a youth 12-20 audience co position of 41% and a populati index of 261. As such, a media plann would consider Vibe a superior me um for reaching the youth populatio

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Table 3 shows 24 magazines with alcohol advertising in 2001 that had a youth readership composition of 16% or more. These expenditures total more than $168 million - more than half of all alcohol industry expenditures in measured magazines.

Table 3 – Magazines Exceeding 15.8% Youth Audience Composition

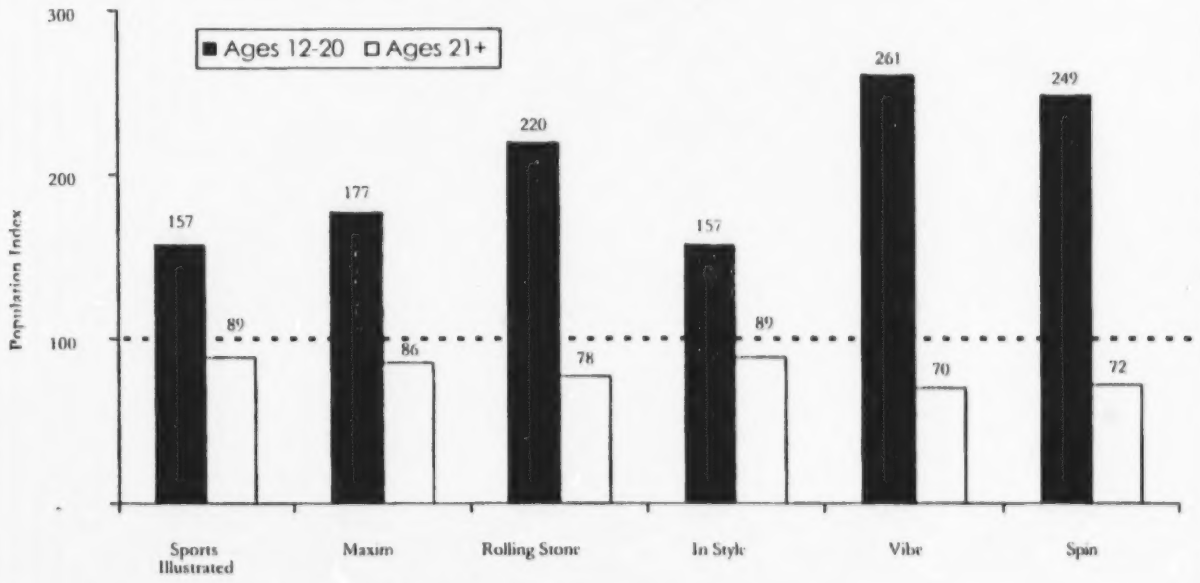
Magazine	12-20 Audience	Alcohol Ad $	Pop Index 12-20	12-20 Audience %
Vibe	3,641,000	$ 3,774,833	261	41%
Spin	1,268,000	$ 3,699,288	249	39%
Rolling Stone	4,193,000	$ 19,444,530	220	35%
Allure	1,820,000	$ 470,737	214	34%
Car and Driver	3,121,000	$ 1,328,159	177	28%
Maxim	3,269,000	$ 21,837,620	177	28%
Glamour	3,656,000	$ 2,328,791	172	27%
Motor Trend	2,308,000	$ 432,485	169	27%
In Style	2,066,000	$ 8,774,400	157	25%
Sports Illustrated	6,127,000	$ 39,352,448	157	25%
Cosmopolitan	4,703,000	$ 13,974,205	155	24%
Vogue	2,636,000	$ 5,750,103	154	24%
Entertainment Weekly	2,368,000	$ 14,246,654	150	24%
Road & Track	1,560,000	$ 607,382	148	23%
Popular Science	1,995,000	$ 587,823	147	23%
Elle	1,150,000	$ 3,054,058	147	23%
Marie Claire	778,000	$ 2,611,545	146	23%
Self	1,147,000	$ 777,159	141	22%
Jet	1,841,000	$ 1,092,856	116	18%
Ebony	2,307,000	$ 1,749,979	115	18%
Essence	1,582,000	$ 1,404,811	111	17%
Popular Mechanics	1,806,000	$ 809,928	108	17%
ESPN The Magazine	1,512,000	$ 12,148,600	102	16%
People	6,189,000	$ 8,026,950	100	16%

Sources: CMR 2001, MRI Teenmark 2001, MRI Adult Study Spring 2002

An analysis of 43 magazines with more than $3 million each in alcohol advertising in 2001 found six magazines with very high concentrations of youth readership versus adult readership.

Figure 10 shows the concentration of an age group in a magazine audience relative to the concentration of that same age group in the base population of persons ages 12+. Take *Sports Illustrated*, for example. For *Sports Illustrated*, the 12-20 readership is 24.8% of all readers, while this same age group represents only 15.8% of the population age 12 and over. Therefore, the relative index of youth readers ages 12-20 is (24.8/15.8)*100 = 157. That is, *Sports Illustrated* has a youth audience that is 57% more concentrated than the general population.

Figure 10 - Magazines with High Youth Audience Composition and at least $3 Million in Alcohol Advertising



Sources: CMR 2001, MRI Teenmark 2001, MRI Adult Study Spring 2002

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The following table lists the five most-advertised alcohol brands in the six magazines above:

Table 4: Largest Alcohol Advertisers in Magazines with High Youth Population Indexes

Magazine	Most-Advertised Brands	Reported Ad Dollars
Sports Illustrated	Jack Daniels Whiskey	$ 6,030,022
	Miller Lite	$ 4,729,605
	Jim Beam Bourbon Whiskey	$ 3,543,725
	Captain Morgan Spiced Rum	$ 3,008,978
	Crown Royal Canadian Whiskey	$ 2,948,826
Maxim	Jim Beam Bourbon Whiskey	$ 1,512,000
	Dewars White Label Scotch	$ 1,026,000
	Kahlua Liqueur	$ 972,000
	Bacardi Light - Dry Rum	$ 928,500
	Cutty Sark Scotch	$ 848,570
Rolling Stone	Jim Beam Bourbon Whiskey	$ 1,138,005
	Dewars White Label Scotch	$ 1,075,960
	Bacardi Light - Dry Rum	$ 993,210
	Fosters Beer	$ 962,135
	Absolut Vodka	$ 956,960
In Style	Hennessy Very Special Cognac	$ 545,600
	Cointreau Liqueur	$ 471,000
	Dekuyper Liqueurs	$ 471,000
	Courvoisier Cognac	$ 471,000
	Skyy Vodka	$ 392,500
Vibe	Courvoisier Cognac	$ 490,065
	Hennessy Privilege Cognac	$ 480,131
	Absolut Vodka	$ 364,237
	Alize Liqueur	$ 331,125
	Absolut Flavored Vodka	$ 264,900
Spin	Jim Beam Bourbon Whiskey	$ 511,572
	Bacardi Light - Dry Rum	$ 424,674
	Skyy Vodka	$ 378,983
	Cutty Sark Scotch	$ 297,131
	Heineken Beer	$ 287,320

Source: CMR 2001

Following where the alcohol advertising dollars were spent in 2001 also demonstrates the exposure of youth to the industry's ads. Of the top 10 magazines, ranked by alcohol ad dollars spent in 2001, eight of them had youth readerships above 15.8% (the concentration of youth ages 12-20 in the general population age 12 and over).

Table 5: Magazines by Alcohol Advertising and Youth Audience Composition

Magazine	2001 Alcohol Advertising ($ millions)	Rank	% of Total Ad Dollars in Publication	Youth Audience Ages 12-20	
				Youth Readership	% of Total Audience
Sports Illustrated	$ 39.4	1	7%	6,127,000	25%
Playboy	$ 22.0	2	28%	945,000	10%
Maxim	$ 21.8	3	14%	3,269,000	28%
Rolling Stone	$ 19.4	4	12%	4,193,000	35%
Entertainment Weekly	$ 14.2	5	7%	2,368,000	24%
Cosmopolitan	$ 14.0	6	5%	4,703,000	24%
ESPN The Magazine	$ 12.1	7	10%	1,512,000	16%
GQ-Gentlemen's Qrtly	$ 11.7	8	11%	693,000	11%
In Style	$ 8.8	9	4%	2,066,000	25%
People	$ 8.0	10	1%	6,189,000	16%

Sources: CMR 2001, MRI Teenmark 2001, MRI Adult Study Spring 2002

With the extent of audience research available, marketers who choose to advertise in *Spin, Vibe, Rolling Stone,* and *Maxim* know they will reach a large number of youth ages 12-20.

Analyzing the percentage of ad spending that alcoholic beverage brands place in youth-oriented magazines[18] provides another insight. Seventy-two (72) of 205 brands that advertised in measured magazines in 2001 placed more than 50% of their advertising dollars in youth-oriented magazines. Included in this group of 72 brands were 25 brands that placed 100% of their magazine advertising in youth-oriented magazines (Table 6).

Table 6 – Alcohol Brands Only Advertising in Youth-Oriented Magazines

Brand Name	Magazine Ad Spending
Miller Lite	$ 4,970,570
Heineken Beer	$ 3,748,315
Bacardi Light Rum	$ 3,503,523
Skyy Vodka	$ 3,408,308
Cutty Sark Scotch	$ 1,662,976
Killarneys Red Lager	$ 1,183,425
Jameson Irish Whiskey	$ 854,000
Skyy Flavored Vodka	$ 832,335
Bacardi Rum	$ 706,233
Becks Beer	$ 671,600
Rolling Rock Beer	$ 413,820
Captain Morgan Parrot Bay	$ 407,496
Becks Light Beer	$ 368,000
Evan Williams Bourbon Whiskey	$ 345,000
Kahlua Cocktails	$ 269,100
Midori Liqueur	$ 235,500
Miller Genuine Draft Light Beer	$ 233,450
Kahlua Black Russian Cocktail	$ 179,345
Christian Brothers Brandy	$ 171,120
Bacardi Gold Reserve Rum	$ 162,512
Kahlua White Russian Cocktail	$ 148,465
Hennessy VSOP Cognac	$ 109,923
Jim Beam White Bourbon Whiskey	$ 92,000
Coors Light Beer	$ 68,471
Colt 45 Malt Liquor	$ 20,695

Sources: CMR 2001, MRI Teenmark 2001, MRI Adult Study Spring 2002

[18] Youth-oriented magazines are magazines with an ages 12-20 audience composition of greater than 15.8%. In other words, these are magazines with a youth audience composition greater than in the general population age 12 and over.

Conclusion

In its 1999 report *Self-Regulation in the Alcohol Industry: A Review of Efforts to Avoid Promoting Alcohol to Underage Consumers*, the Federal Trade Commission rightfully pointed out: "Underage alcohol use is a significant national concern."[19] Alcohol plays a substantial role in the three leading causes of death among youth, and children who begin drinking before the age of 15 are four times more likely to develop dependence than young adults who wait until age 21.[20]

To address underage drinking and the impact of alcohol industry advertising, the Commission concluded "improvements are needed both in code standards and implementation to ensure that the goals of the industry [voluntary marketing] codes are met."[21] Based on the evidence presented in this report, it is apparent that when it comes to magazine advertising for alcohol, industry self-regulation is not working. Young people are overexposed to alcohol advertising, and numerous alcohol advertisers have chosen to place their promotional messages in magazines with disproportionately large youth audiences.

In addition to the FTC, numerous public health and safety organizations have called for stricter standards for alcohol advertisers, and for stronger enforcement than is currently available through the voluntary codes of the industry. For instance, Mothers Against Drunk Driving (MADD) has asked that the industry refrain from advertising in venues where more than 10% of the audience is under the legal drinking age.[22]

From the evidence presented here, the Center on Alcohol Marketing and Youth believes that the alcohol industry has not heeded the recommendations of the FTC, and therefore calls upon the FTC to re-open its inquiry into the promotion of alcohol to underage consumers.

Appendix A - Methodology

Research Process

Our research methodology followed a process similar to that of a media planner. We first investigated advertising spending of all brands in each alcoholic beverage category. We next used audience research data to quantify the demographic composition of audiences reached with each brand's advertising schedule.

Counting Ads - Using Competitive Media Reporting

Advertising occurrence data from Competitive Media Reporting (CMR) were used to identify brand advertising by publication and date. CMR measures over 300 publications in addition to television and other media. CMR and its predecessor companies have been an advertising industry standard reference for decades.

For this report, only alcoholic beverage product advertising in national or full editions of publications, as measured by Mediamark Research Inc. (MRI), was included.

We did not include non-product advertising.

Advertising in regional editions of magazines was omitted, as it is not practical to assign a national audience estimate to ads appearing in only a portion of a magazine's circulation.

[19] Federal Trade Commission. (September 1999). Self-Regulation in the Alcohol Industry: A Review of Industry Efforts to Avoid Promoting Alcohol to Underage Consumers. Executive Summary: i.

[20] Grant, B.F., D.A. Dawson. (1997). "Age at onset of alcohol use and its association with DSM-IV alcohol abuse and dependence: Results from the National Longitudinal Alcohol Epidemiologic Survey." Journal of Substance Abuse 9: 103-110.

[21] Federal Trade Commission. (September 1999). Self-Regulation in the Alcohol Industry: A Review of Industry Efforts to Avoid Promoting Alcohol to Underage Consumers. Executive Summary: ii.

[22] Mothers Against Drunk Driving. MADD Online: MADD's Positions on Responsible Marketing and Service. <http://www.madd.org/activism/0,1056,1621,00.html>.

Table 7: Disposition of Advertising Occurrences

	Magazine Titles	Number of Alcohol Ads	Alcohol Advertising Dollars ($000)	% Titles	% Ads	% Dollars
All Alcohol Ads in 2001	165	5,583	$402,363	100%	100%	100%
National Edition Only	159	4,975	$375,135	96%	89%	93%
Alcohol Product Ads Only	153	4,917	$371,410	93%	88%	92%
Tracked in MRI	98	3,616	$320,380	59%	65%	80%

Source: CMR

Only those publications reported in either the MRI Teenmark 2001 or the MRI Spring 2002 surveys were included in the analysis.

By restricting this analysis to product advertising in full-run circulation of MRI-reported audiences, we tracked 80% of magazine advertising expenditures in 2001.

Measuring Audiences

Sources of Magazine Audience Data

Mediamark Research Inc. (MRI), the leading source of U.S. magazine audience estimates for consumer advertising, conducts ongoing studies of adults and teens to ascertain publication audience readership. These data are published twice per year (for adults 18+) and annually (for teens). Audience estimates from the Spring 2002 Adult Study (representing surveys from March 2001 through March 2002) and the Teenmark 2001 survey (representing surveys from the summer of 2001) were used for this report. The Adult Study was used for all 18+ estimates, and Teenmark for all age 12-17 estimates. While both the Adult Study and Teenmark measure ages 18-19; we used the more widely accepted Adult Study as the source for ages 18-19.

Notes on Magazine Audience Research Methodology

The adult survey methodology uses a "recent reading" technique that identifies readers in an average issue of each publication. The teen survey methodology, using a household sample drawn from the Adult Study, employs a "frequency of reading" process in which respondents indicate, for those publications they have read or looked into at all within the past 6 months, how many (out of an average four issues) they have read. The raw data are weighted such that a respondent claiming to have read one out of four issues is assigned a .25 probability of being in the average audience for the magazine, two out of four a .50 probability, etc.

The two surveys represent differing methodologies - a common feature of advertiser-supported media surveys - but they are also the most commonly accepted and used magazine audience surveys for their respective markets. MRI publishes a combined study of the ages 12+ population ("MRI TwelvePlus") using a narrow range of selected magazines reported in both the adult and teen studies, but it does not have the current data required for a comprehensive review of the alcoholic beverage category; hence the use in this report of the most recent Adult Study and Teenmark.

Ad Exposure Measures

To calculate audience delivery, we credited publication audience estimates for discrete demographic cells for each publication issue in which a brand was advertised. We did not credit multiple brand insertions within a single issue, for to do so would overstate audience exposure. We did not differentiate between ad type (size, color, etc.), as differential advertising impact measures based on advertising unit are not universally accepted.

Reach Calculations

Audience reach estimates were calculated using IMS (Interactive Market Systems) print media evaluation applications and MRI Adult Study and Teenmark. IMS is the leading provider of print media evaluation software for advertising.

SMRB Corroboration

MRI Magazine audience profiles were compared to those for SMRB (Simmons Market Research Bureau), an alternative source for magazine audiences, and were found to generally follow the pattern of MRI audience findings with normal exceptions based on sampling, timing and methodology variations. Were the analysis conducted using SMRB rather than MRI data, the total measured audience exposure for both underage and legal age populations would have been less, while the relative exposure for underage vs. legal age audiences would have been greater. Since MRI is the industry standard for magazine audiences, it was used as the source for audience estimates.

Magazines and Ads Not Counted

Certain publications with significant alcohol advertising as tracked by CMR are not currently measured by MRI and were therefore not included in this analysis. Of the 153 magazines with alcohol product advertising in 2001, 55 were not measured for media audiences by MRI. These publications represent $51 million in 2001 product advertising for alcoholic beverages.

The magazines and associated alcohol advertising expenditures not analyzed in this study because of this lack of data are listed in Appendix C.

Certain other popular publications with substantial alcohol advertising are not yet reported in the MRI teen study, and are only reported in the MRI study of persons 18 and older. For publications that were not measured or reported in the 2001 MRI TeenMark Study, we show no reported audience under the age of 18. Because this analysis is based only on published, industry accepted survey data, we have not attempted to estimate the age 12-17 audiences for those publications, although all may be presumed to have at least some readership under the age of 18.

Alcohol Category and Brand Classifications

Category and brand classifications were defined by Impact, an industry reference published by M. Shanken Communications Inc., so that the categories and brands represented in this report would be consistent with the classifications used by the industry.

The industry itself is experiencing significant change, primarily through new "malternative" beverages, which are derived from different bases (most commonly malt). These are frequently marketed through joint agreements between distillers and brewers, and are grouped by Impact under a common label: "low-alcohol refreshers."

The following table represents the different classes of alcohol products according to Impact:

Beverage Group	Beverage Class
Beer and Ale	Regular Beer and Ale
	Light Beer
	Dry Beer
	Ice Beer
	Malt Liquor
Distilled Spirits	Whiskey
	White Goods
	Brandy and Cognac
	Specialty (e.g. Liqueurs and Cordials)
Wine	Table Wine
	Sparkling Wine
	Port
	Sherry
	Vermouth
	Wine Beverages
	Specialty Brands
Low-Alcohol Refresher	Low-Alcohol Refresher

Source: Impact

Appendix B - Glossary of Advertising Terms

Advertising exposure is most commonly measured in terms of reach, frequency and rating points. We have provided a glossary of terms for those unfamiliar with this terminology.

This report makes use of publication readership data, which are based on audiences, not magazine circulation. Circulation refers to the number of issues purchased or distributed; audience refers to the average number of readers, typically three to ten times as great as circulation.

Target Audience(s)
The target audience for advertising provides a description of the demographics (age, gender, income, etc) of the people the advertiser seeks to reach with its message.

Reach
Reach is used to describe the percentage of a target population that has the potential to see an ad or a campaign through readership of selected media.

Frequency
Frequency indicates the number of times individuals are exposed to an ad or campaign; it is most often expressed as an average number of exposures.

Rating Points
Rating points, or GRPs (Gross Rating Points), is a measure of total advertising exposure and reflects both reach and frequency. One rating point equals the number of exposures equivalent to one percent of a target population, and it may include repeat exposures. In advertising math, reach x frequency = GRPs:

	75	Reach (% of the potential audience)
x	6.8	Frequency (average number of exposures)
=	510	GRPs or Rating Points

Composition
Composition is a measure of audience concentration for a particular demographic. If the 12-20 age composition of Vibe is 41%, this is a way of stating that 41% of Vibe's audience is between the ages of 12 and 20.

Population Index
Population index (or audience concentration relative to population) is a statistic that compares the demographic composition of a magazine audience to the composition of the base population. If a magazine's composition is greater than the population for a particular age cell, the index is greater than 100; if it is less than the population, it is less than 100.

The formula is:

((magazine composition) / (population composition) * 100)

	Youth Ages 12 -20	Adults Ages 21+
Magazine Audience	41.13%	58.87%
Population	15.75%	84.25%
Index	261	70

Appendix C - List of Magazines Not Measured

Magazine Title	2001 Alcohol Ads	Alcohol Ad Dollars ($000)	% Ads	% Dollars
New York Times Magazine	66	$ 5,558	1.2%	1.4%
Stuff For Men	93	$ 5,093	1.7%	1.3%
W Magazine	50	$ 4,156	0.9%	1.0%
FHM	87	$ 4,087	1.6%	1.0%
Details	83	$ 3,117	1.5%	0.8%
Fast Company	42	$ 2,482	0.8%	0.6%
Out	134	$ 2,435	2.4%	0.6%
Talk	35	$ 2,015	0.6%	0.5%
Saveur	70	$ 2,005	1.3%	0.5%
Jane	48	$ 1,948	0.9%	0.5%
Wired	44	$ 1,898	0.8%	0.5%
Gear	47	$ 1,538	0.8%	0.4%
Advocate	138	$ 1,306	2.5%	0.3%
O, Oprah Magazine	11	$ 1,214	0.2%	0.3%
Mademoiselle	16	$ 1,141	0.3%	0.3%
Business 2.0	24	$ 1,051	0.4%	0.3%
Movieline	42	$ 960	0.8%	0.2%
Lucky	23	$ 841	0.4%	0.2%
This Old House	19	$ 757	0.3%	0.2%
Red Herring	19	$ 749	0.3%	0.2%
NFL Insider	11	$ 675	0.2%	0.2%
Natl Geo Adventure	20	$ 641	0.4%	0.2%
Industry Standard	14	$ 607	0.3%	0.2%
Departures	9	$ 465	0.2%	0.1%
Sound & Vision	7	$ 400	0.1%	0.1%
Worth	8	$ 387	0.1%	0.1%
eCompanyNow	13	$ 361	0.2%	0.1%
Latina	22	$ 334	0.4%	0.1%
T&L Golf	9	$ 322	0.2%	0.1%
People En Espanol	12	$ 319	0.2%	0.1%
Expedia Travels	7	$ 243	0.1%	0.1%
American Heritage	11	$ 235	0.2%	0.1%
Real Simple	5	$ 230	0.1%	0.1%
On Magazine	3	$ 176	0.1%	0.0%
Robb Report	10	$ 171	0.2%	0.0%
Sports Afield	6	$ 134	0.1%	0.0%
Garden Design	3	$ 106	0.1%	0.0%
Economist	3	$ 98	0.1%	0.0%
Cruising World	6	$ 86	0.1%	0.0%
Senior Golfer	5	$ 83	0.1%	0.0%
RD Selecciones	3	$ 77	0.1%	0.0%
George	2	$ 73	0.0%	0.0%
SI For Women	3	$ 71	0.1%	0.0%
Nexos	6	$ 70	0.1%	0.0%
Organic Style	2	$ 63	0.0%	0.0%
Travelocity	5	$ 63	0.1%	0.0%
More	2	$ 61	0.0%	0.0%
Southwest Airlines Spirit	3	$ 60	0.1%	0.0%
Harvard Business Review	2	$ 58	0.0%	0.0%
Today's Homeowner	1	$ 53	0.0%	0.0%
Islands	2	$ 46	0.0%	0.0%
Los Angeles Times	1	$ 45	0.0%	0.0%
Snowboard Life	3	$ 29	0.1%	0.0%
Celebrated Living	2	$ 24	0.0%	0.0%
Showboats International	2	$ 22	0.0%	0.0%

Source: CMR 2001

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Center on Alcohol Marketing and Youth
Georgetown University
2233 Wisconsin Avenue, N.W., Suite 525
Washington, D.C. 20007
(202) 687-1019

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